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# Desk Reviews

## In the PIA System

Version: March 2024

# Contents

- ▶ Desk review alerts in PIA
  - ▶ Two types of desk review alerts
  - ▶ Locating desk review alerts in PIA
- ▶ Email alerts
- ▶ Assigning desk reviews to staff
- ▶ How to complete a desk review
  - ▶ Creating the desk review in PIA
  - ▶ Selecting two FEDs to use in the comparison
  - ▶ Opening the FEDs in different windows
  - ▶ Comparing the two FEDs side by side
  - ▶ What you will review for regular and priority desk reviews
  - ▶ Completing and attaching a priority desk review template
  - ▶ Using the comment section
  - ▶ Notifying Aging Well of completed priority desk reviews



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# Desk Review Alerts in PIA

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When information for a desk review is available, PIA will generate an alert to the AAA.

There are two types of desk review alerts.

- ▶ The first is a **priority** alert when the determination has changed from **NFCE to NFI or NFI to NFI**. (Please refer to the [Desk Review Cheat Sheet on the Aging Well website](#) before completing an NFI to NFI priority review).
  - ▶ The alert description will state *Priority Level of Care has changed*.
  - ▶ These must **ALWAYS** be given priority.
- ▶ The second alert is *Information for Desk Review is Available*.
  - ▶ This alert is triggered when an MCO completes an assessment.
- ▶ The next slide shows how to look for both types of alerts.

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# Locating desk review alerts in PIA

The screenshot shows a software interface with a top navigation bar containing 'Home', 'People', 'Assignments', 'My Lists', and 'Alerts'. The 'Alerts' menu item is highlighted with a blue arrow. Below the navigation bar, there is a search section with 'Start Date' (01/28/2013) and 'End Date' (10/14/2019) fields, and a 'Submit' button. A table below the search section has columns: 'Person', 'Person's ID', 'Alert Description', 'Category', 'Date', and 'From'. A blue arrow points to the 'Alert Description' column header. The table contains one row with the following data: 'Name', '123456ABCD789', 'Information for Desk Review is available.', 'Desk Review', 'Date', and 'MCO'. A text box in the lower-left corner of the screenshot contains the text: 'From the menu bar, click on "Alerts." Then, look at the "Alert Description" column.'

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# Exporting desk review alerts in PIA

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If you receive multiple alerts, you have the option to download them into an Excel document. Exporting to Excel allows you to manipulate and save the data.

Aging Well created a quick reference guide for exporting alerts in PIA.

The “Desk Review Alert – Exporting to Excel –Quick Reference” document is available on the AWP Website.

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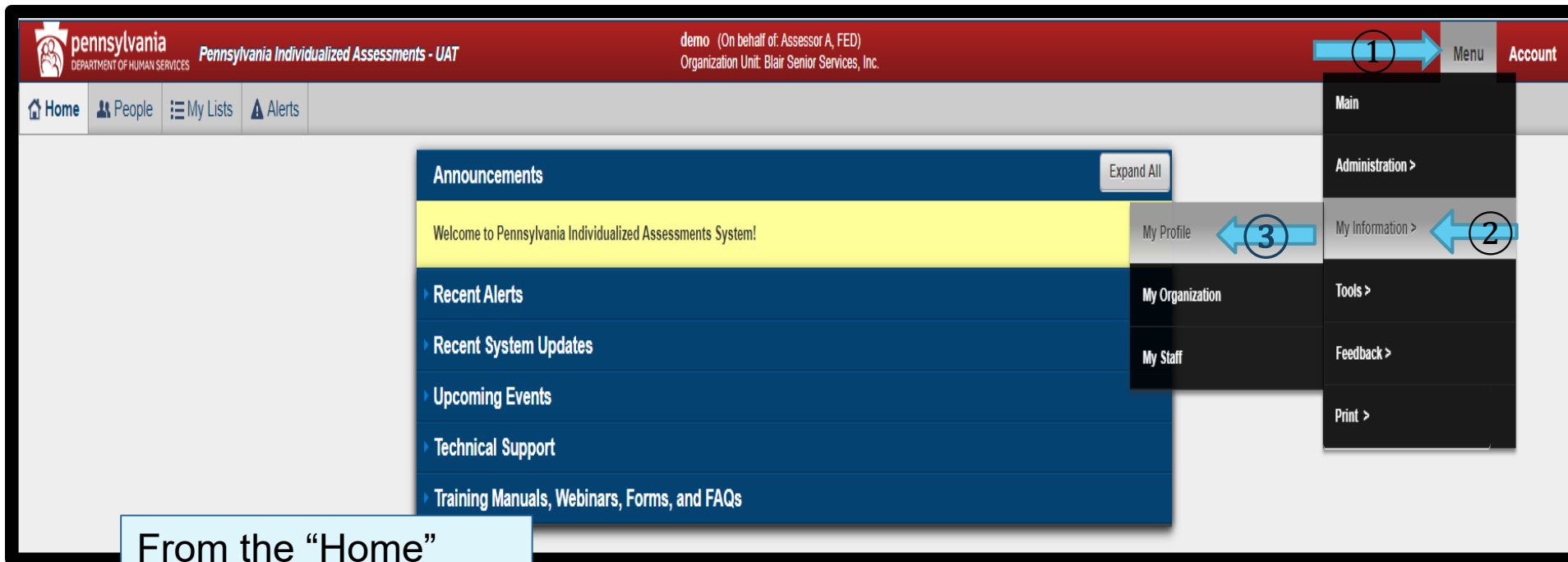
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# Email Alerts

In addition to the alerts in PIA, there is an option to have an email alert sent.



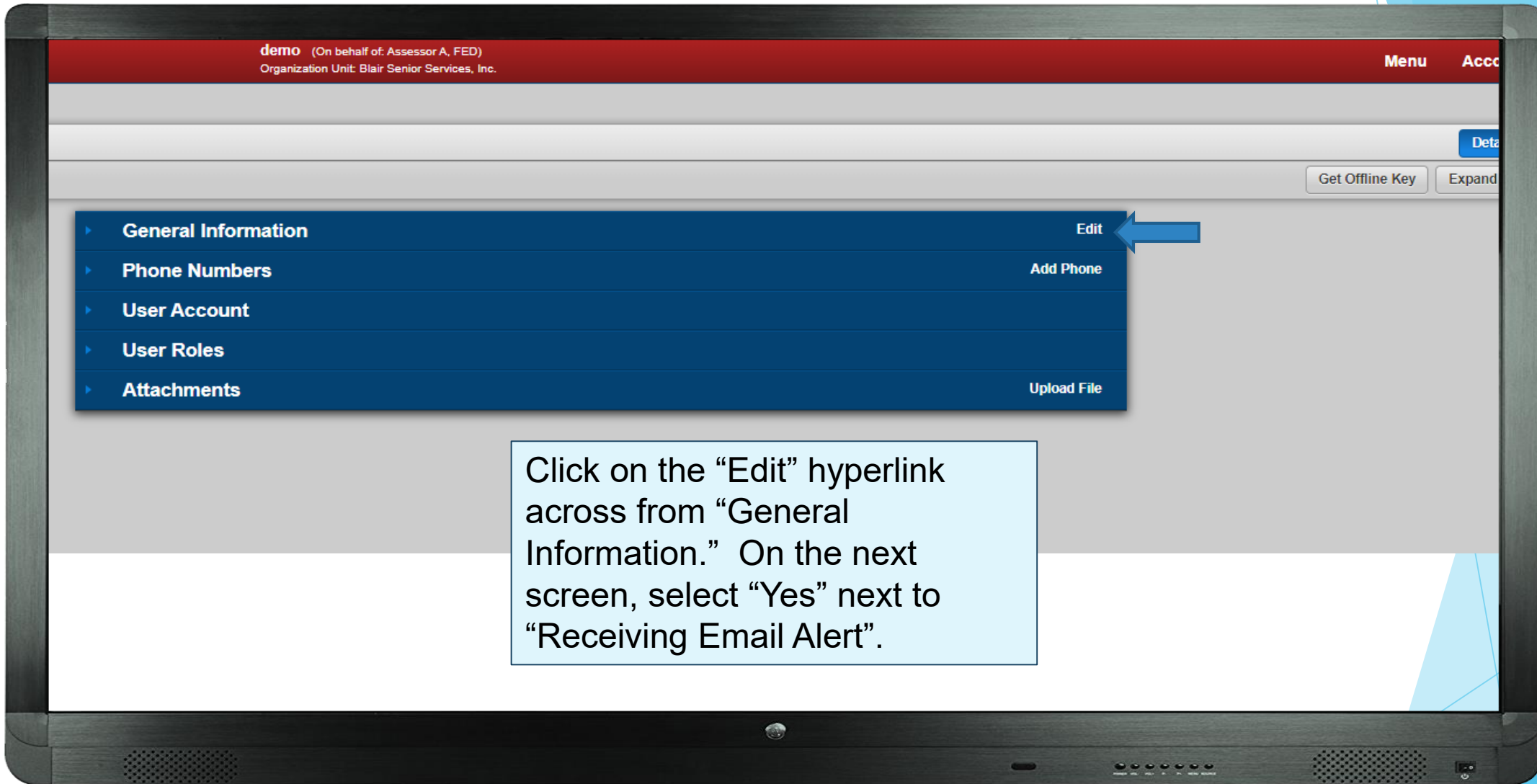
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From the “Home” page, hover on “Menu” then “My Information,” & then click “My Profile”



Click on the “Edit” hyperlink across from “General Information.” On the next screen, select “Yes” next to “Receiving Email Alert”.

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# Assigning Desk Reviews

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- ▶ When an alert arrives, it must be assigned to someone to complete it. This is done in the same way FEDs are assigned.
  
- ▶ Instructions for assigning individuals to staff and managing desk review alerts in PIA are located on the Aging Well website <https://agingwellpa.org> under:
  - ▶ AWP Resources for AAAs
    - ▶ PIA Resources > PIA Quick Reference Guides
      - ▶ Supervisor Quick Reference Guide
    - ▶ Resources for AAA's > Desk Review
      - ▶ Desk Review Alert Process
      - ▶ Desk Review Alert- Exporting to Excel Quick Reference

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# How to Complete a Desk Review

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- ▶ In order to do a desk review, you must have two sets of FED data open at the same time.
- ▶ The next series of slides will show you how to do this.



**Tina Michaels**  
Age: 56  
ID: 1129326IT306100 DOB: 01/02/1963

Person Information — Overview

- Person Information
- Case Management
- Assessment ←
- FED Assessments
- PASRR
- Desk Review ←

Person's Demographics Edit

Person's Information

First Name: **	<input type="text" value="Tina"/>
Last Name: **	<input type="text" value="Michaels"/>
Middle Name:	<input type="text"/>
Preferred Name:	<input type="text"/>
Suffix:	<input type="text"/>
Date of Birth: **	<input type="text" value="01/02/1963"/>
Gender: **	<input type="text" value="Female"/>
Race:	<input type="text"/>
Ethnicity:	<input type="text"/>
Placement County: **	<input type="text" value="Blair"/>
Created By:	<input type="text" value="FED Assessor Supervisor A"/>
Created By OU:	<input type="text" value="Blair Senior Services, Inc."/>
Original Date of Creation:	<input type="text" value="01/21/2019"/>

Additional Information

Person's Identifier:	<input type="text" value="1129326IT306100"/>
SSN:	<input type="text" value="***-**-0236"/>
Medicare #	<input type="text"/>
MCI ID:	<input type="text"/>
Harmony ID	<input type="text"/>
Marital Status:	<input type="text"/>
Primary Language: **	<input type="text" value="English"/>
Date of Death:	<input type="text"/>

After opening the person's record click on "Assessments" & then "Desk Review."

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**Tina Michaels**  
Age: 56  
ID: 1129326IT306100 DOB: 01/02/1963

**Desk Review**

Create New

- Person Information
- Case Management
- Assessment
  - FED Assessments
  - PASRR
  - Desk Review >

Start Date	Due Date	Submitted Date	Created By	Submitted/Withdrawn By	Status	Status Last Modified Date	Actions
------------	----------	----------------	------------	------------------------	--------	---------------------------	---------

02/05/2019	02/20/2019	02/05/2019	DHS Super User A	DHS Super User A	Submitted	02/05/2019	<a href="#">Summary</a>
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You will now see this screen. Click on "Create New" in the upper right corner.

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### Desk Review

Back to List

Create New

	Requested By	Requested Date	Program Type	Assessment Type	Status	Assessment Submitted/Withdrawn Date	Result	Review Requested Date	Review Decision Date	Review Decision
<input type="checkbox"/>	ACFC	11/21/2017	Redeterminations	Initial	Completed	07/18/2018	NFI	N/A	N/A	N/A
<input type="checkbox"/>	ACFC	05/08/2019	Redeterminations	Significant Change	Completed	05/08/2019	NFCE	N/A	N/A	N/A
<input type="checkbox"/>	ACFC	10/28/2019	Redeterminations	Significant Change	Completed	10/28/2019	NFI	N/A	N/A	N/A

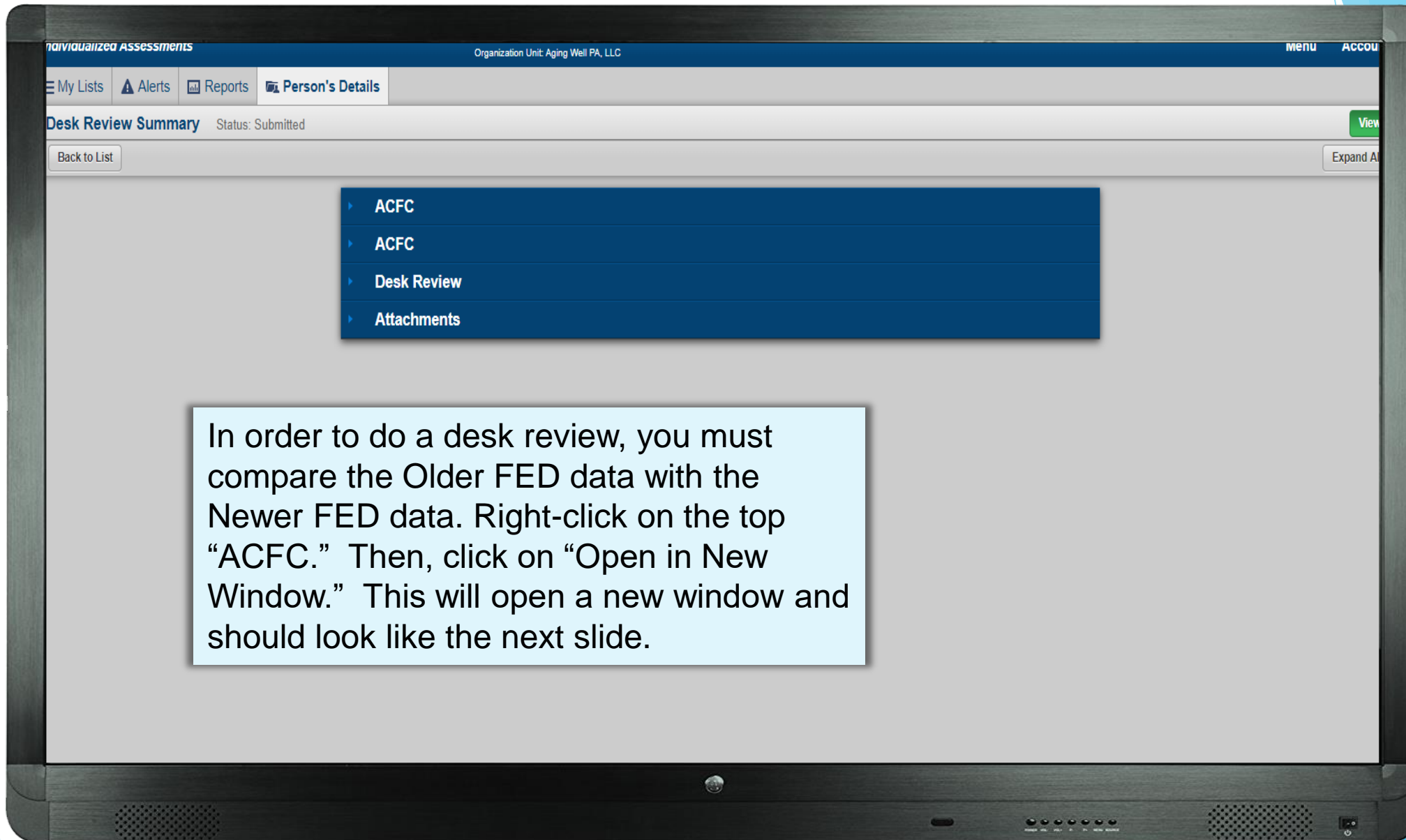
When completing a desk review, you must compare two FEDs. You will select the FEDs by marking the radio box to the left of the FED and then clicking Create New.

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In order to do a desk review, you must compare the Older FED data with the Newer FED data. Right-click on the top “ACFC.” Then, click on “Open in New Window.” This will open a new window and should look like the next slide.

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Desk Review Summary Status: Submitted

Back to List

**ACFC**

**FED Request**

Requested By: ACFC

Requested Date: 05/01/2019

Due Date: 05/07/2019

Date of Scheduling FED:

Program Type: Redeterminations

Assigned AAA:

Status: Completed

Comments

**FED Assessment**

Created Date	Status	Submitted Date	Submitted By	Comments	Actions
	Submitted	06/03/2019	ACFC		<a href="#">Summary</a>

Eligibility Level: NFCE

1

**ACFC**

- Desk Review
- Attachments

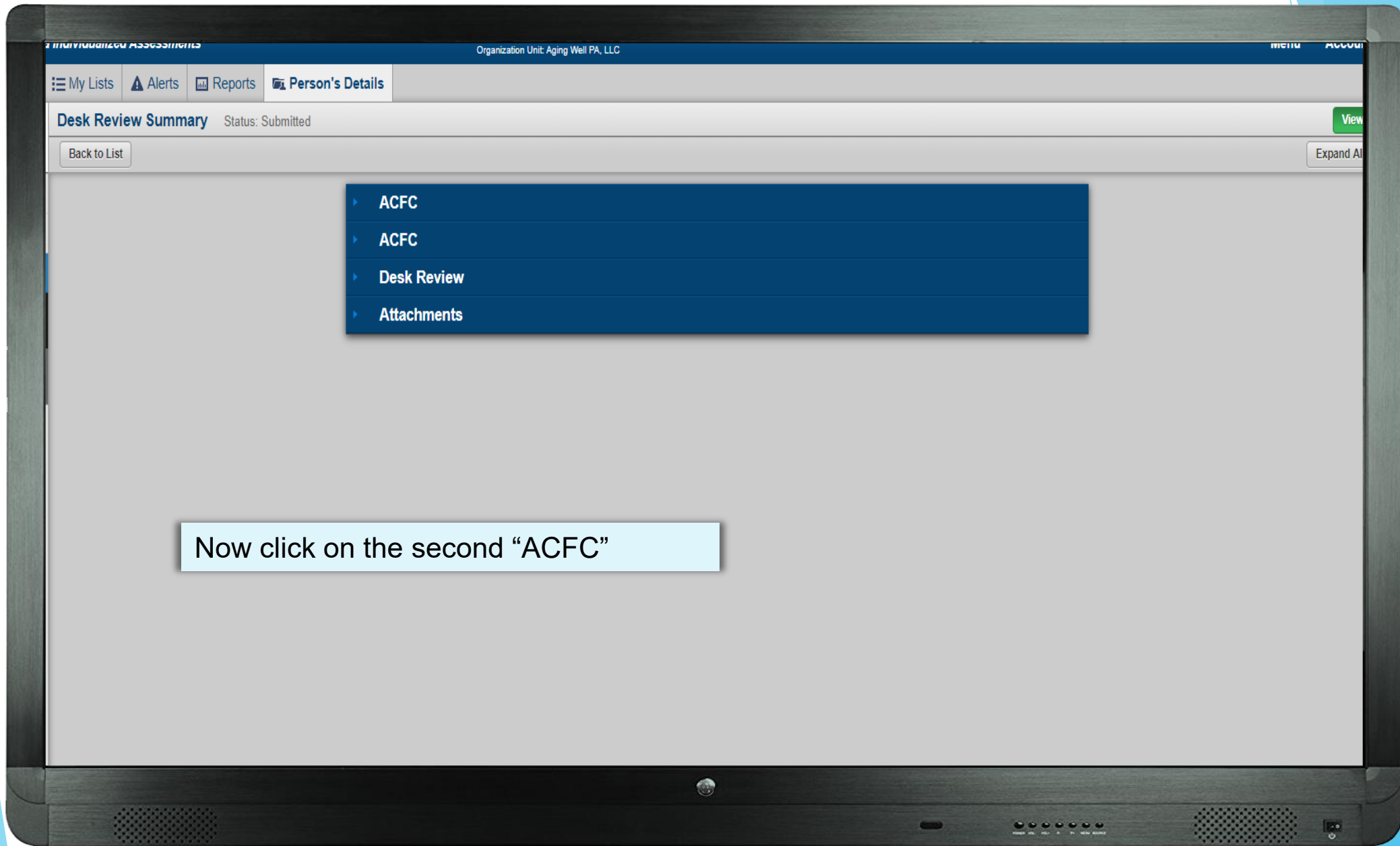
Now return to the other window.

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Now click on the second "ACFC"

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Status: Submitted

**ACFC**

**ACFC**

**FED Request**

Requested By: ACFC

Requested Date: 06/01/2020

Due Date: 06/01/2020

Date of Scheduling FED:

Program Type: Redeterminations

Assigned AAA:

Status: Completed

Comments

Submitted Date	Submitted By	Comments	Actions
06/01/2020	ACFC		<a href="#">Summary</a>

Eligibility Level: NFI

0

**Desk Review**

**Attachments**

Both windows should now be displaying basic information. For each of the open windows, click on "Summary."



## PA FED (Functional Eligibility Determination) form

A. Identification Information

B. Cognition

C. Mood and Behavior

D. Functional Status

E. Continence

F. Treatments and Procedures

Save

Next >

Back to Main System

### 1. Name

First Name \*\*

Harold

Middle Initial

You should now have two windows open that both look like this. Your next step is to place the windows side-by-side to make the review easier.

The quickest way to do this is to drag the screen's title bar to one side of your screen. When the cursor touches the screen edge, release the mouse button. Now, do the same thing, dragging the title bar to the opposite side of the screen. If you are using Windows 10, you can do this even quicker. See the directions located here for these procedures.

<https://support.microsoft.com/en-us/help/4027324/windows-10-snap-your-windows>

3. Birthdate

08/18/1954



### PA FED (Functional Eligibility Determination) form

Identification Information

Cognition

Mood and Behavior

Functional Status

Continence

Treatments and Procedures

Save Next > Back to Main System

#### 1. Name

First Name \*\*

Harold

Middle Initial

Last Name \*\*

Thompson

Jr. / Sr.

2. Gender \*\*

1 - Male

3. Birthdate \*\*

08/18/1954

A. Identification Information

B. Cognition

C. Mood and Behavior

D. Functional Status

E. Continence

F. Treatments and Procedures

### PA FED (Functional Eligibility Determination) form

Save Next > Back to Main Sys

#### 1. Name

First Name \*\*

Harold

Middle Initial

Last Name \*\*

Thompson

Jr. / Sr.

2. Gender \*\*

1 - Male

2 - Female

3. Birthdate \*\*

08/18/1954

You can begin the desk review with the previous and current FEDs opened and side-by-side. Making notes outside of PIA may make it easier to keep track of any discrepancies you might find.

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# What Will You Review?

For all desk reviews:

- ▶ Look to see if the MCO assessment was completed on time. This means the MCO did an assessment on one or more occasions within the past 300-364 days.
  - ▶ If the MCO assessment was not completed on time, this should be noted in the Comments Section of the desk review (this is covered in later slides).
- ▶ Determine if there are any factual discrepancies in the personal information (correct name, date of birth, gender, etc.)
- ▶ Determine if the FED is complete. Are all the items in the original FED in the new assessment?

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# For Priority Reviews NFCE to NFI

- When you have a case that has gone from **NFCE to NFI**, you complete all the items listed on the previous slide.
- Additionally, you must complete the **template** presented on the following several slides and attach it to the person's record.
- The template should not be used for non-priority reviews.

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# Desk Review Template Description

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- ▶ The template includes only the FED items used by the translator to calculate a final determination.
- ▶ It includes scoring values for a partial deficit & values for a full deficit.
- ▶ It provides a place to enter information comparing scores & a way to identify if any change in scores has changed the deficit level.

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# Desk Review Template

This form's most up-to-date fillable PDF copy can be found on the Aging Well PA Website.

When filling in the answers to the “Current Scores” column, you may write each score in that section with a comma in between, as shown in the picture.

If there is an “or,” provide an answer for both. For example, Section D should have 9 answers.

## DESK REVIEW TEMPLATE

When completing a desk review, in addition to identification information look at the following items to determine if a change how the FED Translator calculates the final determination. For example, you will look to see if a full deficit has changed to a full deficit. The following are the items to examine.

Item & Description	Scoring for a Partial Deficit	Scoring for a Full Deficit	Current Scores
B.1. Cognitive Skills for Daily Decision Making	A score of 2 to 4 = partial deficit.	A score of 5 = full deficit	<input checked="" type="checkbox"/> No Change FED #1 Score _____ FED #2 Score _____
B.2.a. Short Term Memory B.2.b. Procedural Memory B.2.c. Situational Memory	A score of 1 on one or more on any item = partial deficit.	No full deficit possible with just these items.	<input type="checkbox"/> No Change FED #1 Scores <u>0, 0, 0</u> FED #2 Scores <u>1, 0, 1</u>
B.3.a. Easily Distracted B.3.b. Disorganized Speech B.3.c. Mental Function Varies	A score of 1 or 2 on one or more of any item = partial deficit.	No full deficit possible with just these items.	<input type="checkbox"/> No Change FED #1 Scores <u>0, 0, 0</u> FED #2 Scores <u>2, 0, 2</u>

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# PRIORITY DESK REVIEW TEMPLATE

Name \_\_\_\_\_ PIA ID \_\_\_\_\_ Date \_\_\_\_\_

Completed by: \_\_\_\_\_



When completing a desk review, in addition to identification information look at the following items to determine if any scoring change was significant enough to change how the FED Translator calculates the final determination. For example, you will look to see if a full deficit has changed to a partial deficit or if a partial deficit has changed to a full deficit. The following are the items to examine.

Item & Description	Scoring for a Partial Deficit	Scoring for a Full Deficit	Current Scores	If there is a change in deficit classification, please indicate which it is.
B.1. Cognitive Skills for Daily Decision Making	A score of 2 to 4 = partial deficit.	A score of 5 = full deficit	<input type="checkbox"/> No Change FED #1 Score _____ FED #2 Score _____	<input type="checkbox"/> Change from partial to no deficit <input type="checkbox"/> Change from partial to a full deficit <input type="checkbox"/> Change from full deficit to a partial deficit <input type="checkbox"/> Change from full deficit to no deficit <input type="checkbox"/> Change from no deficit to a partial deficit <input type="checkbox"/> Change from no deficit to a full deficit
B.2.a. Short Term Memory B.2.b. Procedural Memory B.2.c. Situational Memory	A score of 1 on one or more on any item = partial deficit.	No full deficit possible with just these items.	<input type="checkbox"/> No Change FED #1 Scores _____ FED #2 Scores _____	<input type="checkbox"/> Change from no deficit to a partial deficit <input type="checkbox"/> Change from partial deficit to no deficit
B.3.a. Easily Distracted B.3.b. Disorganized Speech B.3.c. Mental Function Varies	A score of 1 or 2 on one or more of any item = partial deficit.	No full deficit possible with just these items.	<input type="checkbox"/> No Change FED #1 Scores _____ FED #2 Scores _____	<input type="checkbox"/> Change from no deficit to a partial deficit <input type="checkbox"/> Change from partial deficit to no deficit
C.1.a. Wandering C.1.b. Verbal Abuse C.1.c. Physical Abuse C.1.d. Socially Inappropriate or Disruptive	A score of 2 or 3 on one or more of any item = partial deficit.	No full deficit possible with just these items.	<input type="checkbox"/> No Change FED #1 Scores _____ FED #2 Scores _____	<input type="checkbox"/> Change from no deficit to a partial deficit <input type="checkbox"/> Change from partial deficit to no deficit

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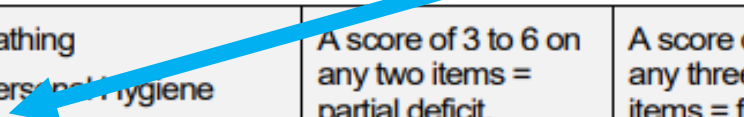


Name \_\_\_\_\_ PIA ID \_\_\_\_\_ Date \_\_\_\_\_

Completed by: \_\_\_\_\_

If there is an "or," provide a score for both. For Example: Section D should have 9 scores.

D.1.a. Bathing D.1.b. Personal Hygiene D.1.c. or D.1.d. Dressing D.1.e. or D.1.f. Walking/ Locomotion D.1.g. or D.1.h. Toilet use or transfer D.1.i. Eating	A score of 3 to 6 on any two items = partial deficit.	A score of 3 to 6 on any three or more items = full deficit.	<input type="checkbox"/> No Change FED #1 Scores _____ FED #2 Scores _____	<input type="checkbox"/> Change from partial to no deficit <input type="checkbox"/> Change from partial to a full deficit <input type="checkbox"/> Change from full deficit to a partial deficit <input type="checkbox"/> Change from full deficit to no deficit <input type="checkbox"/> Change from no deficit to a partial deficit <input type="checkbox"/> Change from no deficit to a full deficit
D.2.a. Primary Mode of Locomotion	A score of 2 = partial deficit.	A score of 3 = full deficit.	<input type="checkbox"/> No Change FED #1 Score _____ FED #2 Score _____	<input type="checkbox"/> Change from partial to no deficit <input type="checkbox"/> Change from partial to a full deficit <input type="checkbox"/> Change from full deficit to a partial deficit <input type="checkbox"/> Change from full deficit to no deficit <input type="checkbox"/> Change from no deficit to a partial deficit <input type="checkbox"/> Change from no deficit to a full deficit
D.3. Managing Medications	A score of 5 or 6 = partial deficit.	No full deficit is possible with this item.	<input type="checkbox"/> No Change FED #1 Score _____ FED #2 Score _____	<input type="checkbox"/> Change from no deficit to a partial deficit <input type="checkbox"/> Change from partial deficit to no deficit
E.3. Bowel Continence	No a partial deficit possible.	A score of 4 or 5 = full deficit.	<input type="checkbox"/> No Change FED #1 Score _____ FED #2 Score _____	<input type="checkbox"/> Change from no deficit to a full deficit <input type="checkbox"/> Change form full deficit to no deficit







# Using the Comments Section

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- ▶ The Comments box is used to describe any discrepancy with the person's identification information and document if the MCO assessment was not completed on time.
- ▶ See the next slide for an example.

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**Tina Michaels**  
Age: 56  
ID: 1129326IT306100 DOB: 01/02/1963

**Desk Review Summary** Status: Submitted

[Back to List](#)

Person Information

Case Management

Assessment

FED Assessments

PASRR

Desk Review

Desk Review Summary

Previous FED Request

Current FED Request

Desk Review

**Desk Review**

Start Date:\*\*   
Due Date:\*\*  ⓘ  
Submitted Date:\*\*   
Created By:\*\*   
Submitted/Withdrawn By:\*\*

Is there a delay? \*\*  Yes  No

Is there a discrepancy? \*\*  Yes  No

Comments:

Attachments

To complete the desk review, return to the Desk Review Summary page & click on "Desk Review." Indicate if there was a delay or any discrepancies. Include comments when there are discrepancies or a delay. The following several slides will elaborate on doing this.



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Cancel

Expand All

Previous FED Request

Current FED Request

### Desk Review

#### Desk Review

Start Date:\* 10/07/2019

Due Date:\* 10/22/2019

Submitted Date:\*

Created By:\* Aging Well Super User A

Submitted/Withdrawn By:

Is there a delay? \*  Yes  No

Is there a discrepancy? \*  Yes  No

Comments:

The gender did not match. Previous FED was male. Current FED female.  
The MCO assessment was completed after the 365-day timeframe.





# Using the Comments Section

- ▶ For any NFCE to NFI situation, complete the comments section with the following:

“See Desk Review Template attachment for details.”

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Cancel

Expand All

▶ Previous FED Request

▶ Current FED Request

### Desk Review

#### Desk Review

Start Date:\* 10/07/2019

Due Date:\* 10/22/2019

Submitted Date:\*

Created By:\* Aging Well Super User A

Submitted/Withdrawn By:

Is there a delay?\*  Yes  No

Is there a discrepancy?\*  Yes  No

Comments:

See Desk Review Template attachment for details.





# How to Attach the Desk Review Template

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For NFCE to NFI priority cases, you must attach the Desk Review Template to the Desk Review “Attachments” section.

The following slides will outline the steps taken to attach your template.

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Once you have typed your desk review attachment comment, you will then click save at the top right corner.

New

Expand All

Save

PHW

### Desk Review

#### Desk Review

Start Date:\* 05/29/2020  

Due Date:\* 06/12/2020 

Created By:\* Aging Well Super User A

Is there a discrepancy?\*  Yes  No

Comments:

See Desk Review Attachment for Details



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Next, you will open the attachments tab and click “upload.”

Person's Details

Progress

PHW	
Desk Review	Edit
Attachments	Upload



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This box will pop up. Click on “Choose File” to upload your Desk Review Attachment form. You may write a comment if you choose. Then, click continue.

**New Attachment**

Allowed File Extensions: PDF, TXT, ZIP, CSV, XLS, DOC, DOCX, XLSX, PPT, PPPX, XML, VSD, XSDX, RTF, JPG, JPEG, BMP, TIFF, TIF, WPD.

File Name\*  
Choose File Desk Review Template.pdf

Comments  
Desk Review Attachment

Cancel Continue

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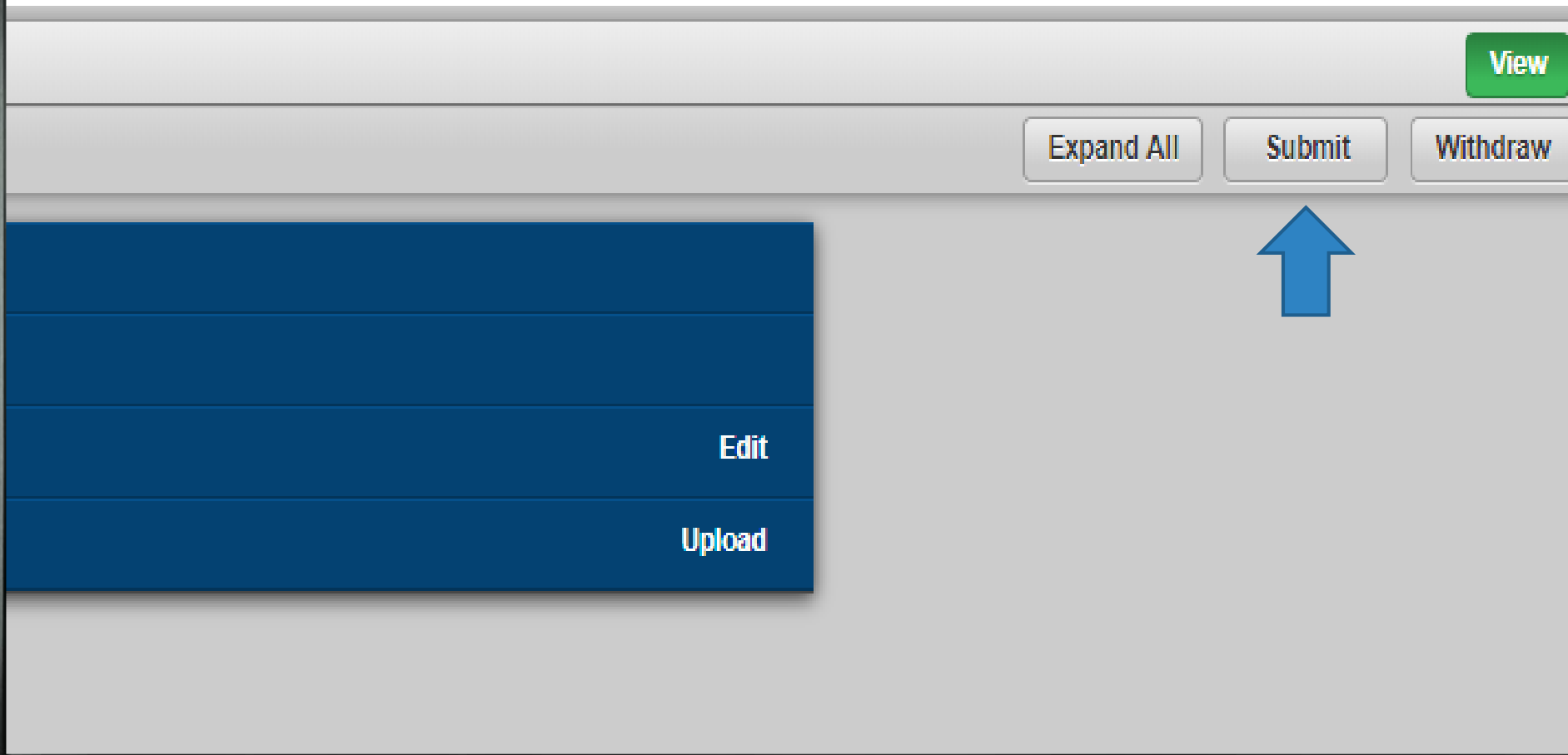
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To upload your attachment, you must go to the top right of your screen and click on **Submit**.



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# Alerting Aging Well

- ▶ All priority desk reviews should be brought to the immediate attention of Aging Well by sending an email with “Priority Desk Review” in the subject line to [aaarequests@agingwellpa.org](mailto:aaarequests@agingwellpa.org). You do not need to copy your QCSS on the email.
- ▶ These will be sent for a Medical Director Review.
- ▶ The email should include the participant’s initials and PIA ID number. Do not include any additional identifying information.

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# Additional Information

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- ▶ This presentation is available in PDF format & posted on the Aging Well website.
- ▶ If you have additional questions or need assistance, please get in touch with your Quality, Compliance & Support Specialist.

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